



Arizona Department of Education
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Grants Management Enterprise Training Manual

Focusing on Amendment For LEA

Arizona Department of Education
1535 West Jefferson St
Phoenix, AZ 85007
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***Indicate system updates effective 02/23/2009. Any Amendment created after 02/23/2009 will use new amendment pages for capital outlay and line item description.** LEA’s amendment process will not change – 02/23/2009 system updates concerns more for ADE program area.

1. Amendment Overview

1. An amendment must be submitted no later than 90 calendar days prior to the project/ grant end date

| Project End Date | On-line availability | Deadline |
|--------------------|--|---------------|
| June 30, 2009 | Anytime after the project has been approved and created in GME | April 2, 2009 |
| September 30, 2009 | | July 2, 2009 |

*This is the system amendment deadline. After this date, the system won't allow a user to submit or edit amendment.

*If you are planning on utilizing the prior year's carryover amount or reallocation, ADE recommends LEA to submit an amendment ASAP. Please do not wait until the amendment deadline.

2. Type of Amendment

Fiscal Amendment

- A. Carryover monies or additional allocations which increase the budget total or other changes
- B. To avoid an over-expenditure on a project/ grant (anticipated expenditures will exceed a budgeted line item by 20% or \$1000)
- C. To avoid an unauthorized expenditure on a project/ grant (anticipated expenditures do not have an approved budget line item)
- D. Increase or decrease line item amount due to A or B or C above or other reasons (You can only increase your budget total if your reason for submitting amendment is A. CarryOver monies or additional allocations.)

Programmatic Amendments

- A. Change approved capital expenditure item(s)
- B. Extend the project ending date beyond the original approval date (only for Federal project)
- C. Budget Line Description change / supplemental data : Change staff duties or responsibilities, type of services

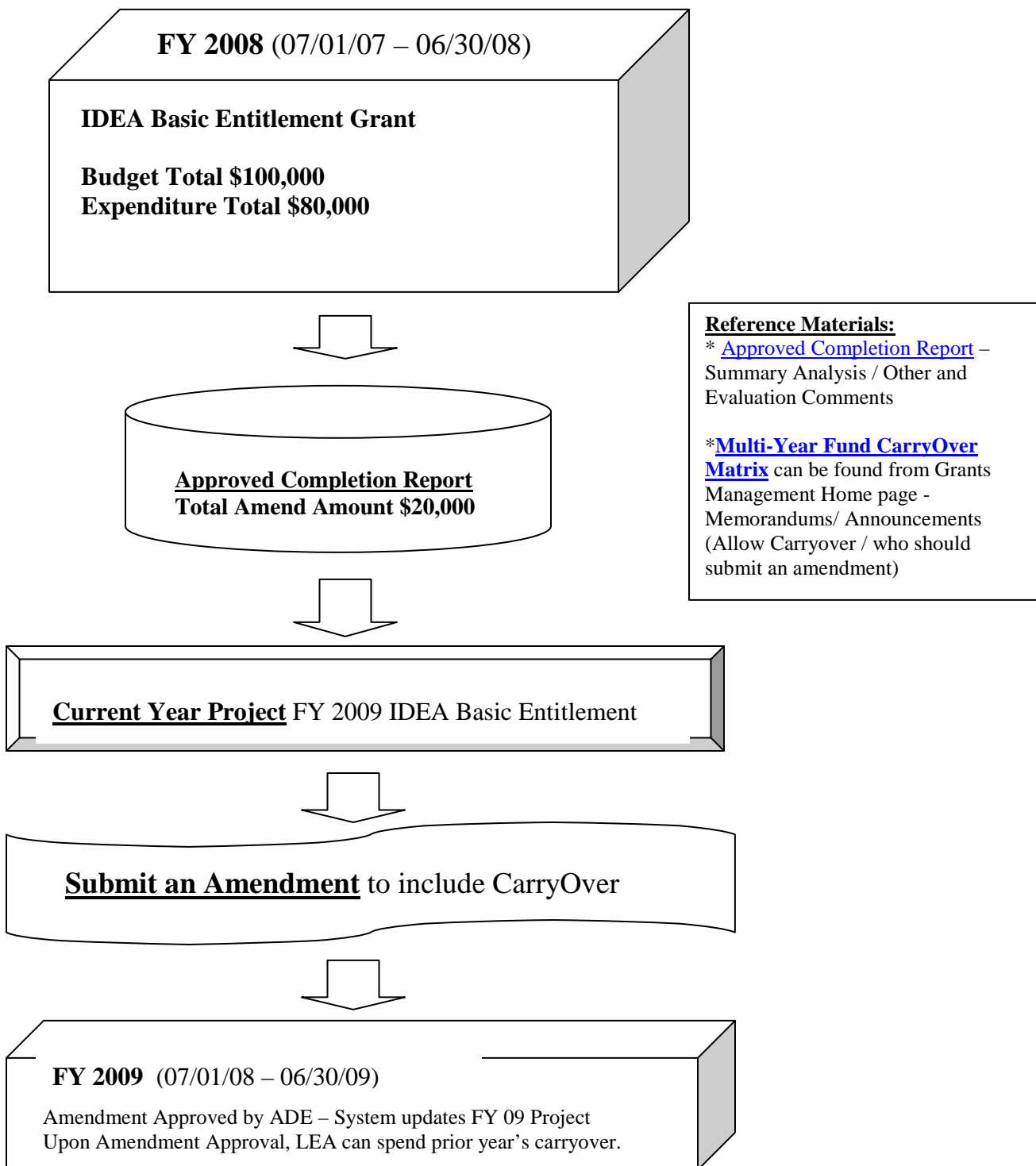
*Amendment for prior year's carryover monies requires approved completion report.

*Amendment for reallocations can be done after ADE notifies LEAs with additional allocation during the project period ex) Title I reallocation.

**If a grant requires Site Budget Breakdown as supplemental data, LEA should revise Site Budget Breakdown page if any of fiscal amendment changes Site information (detail, budget breakdown, and other). Ex. 21st Century*

2 Fiscal Amendment – CarryOver monies

A. Continuing Grant – Dealing with Prior Year’s Monies



2 Fiscal Amendment – CarryOver monies

A. Continuing Grants – Approved Completion Report

1. In order to use prior year's (Current Year -1) monies, LEA must have prior year's approved completion report.

| APPROVED COMPLETION REPORT VIEW | | | | | |
|---|--------------------|---|------------------------|-----------------------|------------------------|
| Funds Summary | | | | | |
| FUNDS SUMMARY | | | | | |
| Total Budgeted Funds | | | | 275,623.00 | |
| Current Fiscal Year ADE Disbursement | | | | 255,995.40 | |
| Carryover Funds | | | | 0.00 | |
| Balance unpaid at project end date | | | | 78,189.40 | |
| Balance unpaid as of 2/3/2009 | | | | 19,627.60 | |
| Allowable Cash on Hand | | | | 0.00 | |
| Cash On Hand (less interest earned) | | | | -58,561.80 | |
| Interest Earned | | | | 200.00 | |
| Other | | | | 1,000.00 | |
| Comments(s) / Explanation of 'Other' Funds (Funds must be clearly identified with a project year.) | | | | | |
| FY 2001 Fund CarryOver 500 interest carryover 100 interest Return 400 | | | | | |
| Expenditures | | | | | |
| Total | | 275,623.00 | 255,995.40 | 19,627.60 | 0.00 |
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |
| Total Budget \$275,623 | | Expended \$255,955.40 = Total ADE Disbursement | | | |
| Unexpended (Budget Balance) | | \$19,627.60 = unpaid balance (\$\$\$ at State) | | | |
| Interest | | \$ 200 (earned interest during the fiscal year against the specific grant fund – doesn't include prior year's interest) | | | |
| Other | | \$1000 | | | |
| | | CarryOver Fund \$500 from FY 2001 | | | |
| | | CarryOver Interest \$100 from FY 2001 | | | |
| | | Return Interest \$400 from FY 2001 | | | |

Total Amend Amount: \$19,627.60 + \$100 = \$19,727.60

Summary Analysis

| SUMMARY ANALYSIS | | |
|------------------|-------------|-----------------|
| Category | Fund Amount | Interest Amount |
| Fiscal year 2006 | | |
| Return | 0.00 | 0.00 |
| Amend - Local | 0.00 | 0.00 |
| Amend - State | 0.00 | 0.00 |
| Fiscal year 2007 | | |
| Return | 0.00 | 0.00 |
| Amend - Local | 0.00 | 0.00 |
| Amend - State | 0.00 | 0.00 |
| Fiscal year 2008 | | |
| Return | 0.00 | 100.00 |
| Amend - Local | 0.00 | 100.00 |
| Amend - State | 19,627.60 | 0.00 |

Other Funds

| OTHER FUNDS | | |
|---------------------------|-----------------|--|
| Type | Amount | Description |
| Other Amend Non Interest | 0.00 | |
| Other Amend Interest | 0.00 | |
| Other Return Non Interest | 500.00 | FY 01 non amended fund |
| Other Return Interest | 500.00 | FY 01 non amended interest and excess interest to return |
| Keep | 0.00 | |
| Not to be Paid | 0.00 | |
| Total | 1,000.00 | |

*LEA can find Summary Analysis from all ADE approved completion report. Other Funds table will be only available when LEA reports Other Funds under Fund Summary. (Other Funds table is an optional table)

- 2. In order to use Prior Year unexpended budget balance (ex \$19,727.60) from the approved completion report, LEA must have the current year project**
(Contact appropriate program area for the status of your application and carryover concern)

- See approved completion report – Release information whether LEA needs to submit an amendment. (ADE submits internal amendment to carryover prior year's monies with some of grants that decrease the current year allocation ex. Early Childhood Block Grant. More information can be found from [Multi-Year Fund CarryOver Matrix](#))

Release Information

| COMPLETION REPORT INFORMATION | |
|-------------------------------|---|
| Evaluation Comments | ADE approved Completion Report. Please amend s/c/o of \$19627.60 and interest of \$100. Please return FY 2001 Fund and Interest \$1000 back to ADE ASAP. |

- 3. Submit an amendment to claim the prior year unexpended budget balance (ex \$19,727.60)**
- 4. After ADE approves the amendment, the system will update the current year project to include amendment information.**
- 5. Now, LEA can spend \$\$\$ under the current year project.**

2. Fiscal Amendment – Avoid Over Expenditure

B. Over-Expenditure Expenditure

Over-Expenditure: a line item that may exceed the last approved line item budget by 20% or \$1000, whichever is greater (not applied to Indirect Cost)

| BUDGET LINE ITEMS | | | | | |
|-------------------|-------------|---------------|-----------------|----------------|-----------------|
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |
| Instruction 1000 | | | | | |
| Salaries | 6100 | 50,000 | 60,000 | -10,000 | 0 |

Ex) approved line item \$50,000 X 20% = 10,000 (over-expenditure allowable)
 10,000 -10,000 = 0

1-1 Practice: How much will be entered as over-expenditure using the figure below?

| BUDGET LINE ITEMS | | | | | |
|-------------------|-------------|---------------|-----------------|----------------|-----------------|
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |
| Instruction 1000 | | | | | |
| Salaries | 6100 | 50,000 | 62,000 | -12,000 | 2000 |

Ex) approved line item \$50,000 X 20% = 10,000 (over-expenditure allowable) 12,000 – 10,000 = 2,000

Upcoming Business Rules Change: Over-Expenditure – a line item that may exceed the last approved line item budget by 10% or \$1000, whichever is greater (not applied to indirect cost). *Effective July 1, 2009, all completion reports and amendment will utilize 10% or 1000 as over expenditure allowable.*

1-2 Practice: How much will be entered as over-expenditure if we use 10% or \$1000 as allowable?

| BUDGET LINE ITEMS | | | | | |
|-------------------|-------------|---------------|-----------------|----------------|-----------------|
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |
| Instruction 1000 | | | | | |
| Salaries | 6100 | 50,000 | 62,000 | -12,000 | 7000 |

Ex) approved line item \$50,000 X 10% = \$5,000 (over-expenditure allowable) 12,000 – 5,000 = 7,000

2. Fiscal Amendment – unauthorized Expenditure

C. Unauthorized Expenditure

Unauthorized Expenditure: Expenditure doesn't have an approved budget line item.

| BUDGET LINE ITEMS | | | | | |
|-------------------|-------------|---------------|-----------------|----------------|-----------------|
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |
| Instruction 1000 | | | | | |
| Salaries | 6100 | 0 | 10,000 | -10,000 | 10,000 |

Unauthorized Expenditure = \$10,000

1. Over-Expenditure/ Unauthorized Expenditure's outcome

ADE may allow the cost (allow the grant to pay the over/ unauthorized expenditure)

ADE may disallow the cost (the disallowed cost should be reversed in the grant fund and then recorded in the other fund (M&O))

2. How to avoid Over-Expenditure/ Unauthorized Expenditure

- a. check **Expenditure Report** with Business Office at least monthly
- b. Submit Amendment to move budget around if Expenditure Report shows any over-expenditure or unauthorized expenditure

3. Practice : Recognizing Over-Expenditure and Unauthorized expenditure

| District Name Training #999 (Vision Expenditure Report) | | | | | | Current FY Only |
|---|-----------------|------------------------|------------------------|-----------------------|------------------------|-------------------------|
| Grants Management Report | | | | | | |
| FUND: 100 | TITLE I-A BASIC | | | | | |
| FUNCTION CODE | OBJECT CODE | BUDGET | EXPEND. AMOUNT | ENCUMBR. AMOUNT | TOTAL AMOUNT | BUDGET BALANCE |
| <u>INSTRUCTION 1000</u> | | | | | | |
| SALARIES | 6100 | \$18,502.00 | \$0.00 | \$0.00 | \$0.00 | \$18,502.00 |
| EMPLOYEE BENEFITS | 6200 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| PURCHASED PROFESSIONAL SERVICES | 6300 | \$10,000.00 | \$11,000.00 | \$2,000.00 | \$13,000.00 | (\$3,000.00) |
| PURCHASED PROPERTY SERVICES | 6400 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| OTHER PURCHASED SERVICES | 6500 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| SUPPLIES | 6600 | \$0.00 | \$2,418.88 | \$1,000.00 | \$3,418.88 | (\$3,418.88) |
| OTHER EXPENSES | 6800 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| SUB TOTAL | | \$18,502.00 | \$13,418.88 | \$3,000.00 | \$16,418.88 | \$12,083.12 |

2. Fiscal Amendment – unauthorized Expenditure

D. Increase or Decrease line item amount ex) Indirect Cost

Increase or decrease line item amount due to CarryOver or reallocation,
Over/unauthorized expenditure or other reasons

Ex) Indirect Cost – those expenses that incur for the joint benefit of more than one project (Only be applied to federally funded projects; however, may be restricted or disallowed on some federal grants. see [Maximum Allowable Indirect Cost by Grants and Projects](#))

Ex) To be used for administrative handling of funding source.

Ex) To be applied to utility costs for facility use.

Ex) Set aside for Accounting Technician and Business Services to manage the grant.

Ex) Used for county indirect and school overhead costs

Maximum Allowable Indirect Cost = Actual Exp. Project Sub Total X Indirect Cost Rate

* Excluding Indirect Cost and capital outlay

Prior to 02/23/2009, LEA can enter maximum indirect amount under Expended Amount and the system will calculate over-expenditure using 20% over expenditure allowable
(ADE Business Rules: For indirect line item, over expenditure is not allowed. Also you cannot go over your budgeted amount)

| BUDGET LINE ITEMS | | | | | |
|-------------------------------------|-------------|---------------|-----------------|----------------|-----------------|
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |
| Project Sub-Total | | 100,000 | 80,000 | 20,000 | 0 |
| Indirect Cost | | | | | |
| Restricted Indirect Cost Rate 8% | 6910 | 1,000 | 6,400 | -5,400 | 5,400 |
| | | \$100,000 | \$80,000 | | |
| | | X | X | | |
| | | 8% | 8% | | |
| | | = \$8,000 | = \$6,400 | | |

*** Effective 02/23/2009, LEA can enter maximum indirect amount under Expended Amount and the system will calculate over-expenditure using Expended Amount – Budgeted Amount.**

(ex Budget Indirect \$1000 Expended \$6,400 - system will consider \$5,400 as over-expenditure)

Prior to 02/23/2009, LEA can enter maximum indirect amount under Expended Amount even with Budgeted Indirect = 0

Effective 02/23/2009, if LEA didn't budget for Indirect Line Item, completion report will not allow a user to enter amount under expenditure. A validation message will appear informing the user that an indirect expenditure is not allowed when zero is budgeted. You must budget an indirect cost in order to claim indirect expenditure.

| | | | | |
|---|------------|-----------|-----------|------|
| Project SubTotal | 110,000.00 | 55,000.00 | 55,000.00 | 0.00 |
| Indirect Cost | | | | |
| Restricted Indirect Cost Rate 7.57 % | 6910 | 0.00 | 5000 | 0.00 |

* check your monthly expenditure report and watch your expenditure total. If needed, submit amendment to increase and decrease indirect cost amount.



3. Programmatic Amendment * A. Capital Outlay

1. **Capital Outlay** – those expenditures intended to benefit future periods, (more than one year life cycle)
2. Capital outlay may be restricted or disallowed on some projects. Please refer to “[Capital Outlay Justification Page](#)” from Grants Management Memorandums/Announcements https://www.ade.az.gov/gme/Additional_Information/memo.asp
3. Project Summary Capital Outlay items are the items ADE approved for LEA to purchase using the specific grant. If LEA needs to delete or add or increase items/quantities/ cost, LEA would need to submit an amendment. Deleted or Added or increased items without amendment process will be considered as Capital Outlay Audit Exception. ADE may or may not cover the cost.
4. Project Summary Capital Outlay can be found from Grants Management Home Page www.ade.az.gov/GME --- Project Summary --- Select your grant --- Click on Grant number - check budget line item to see whether capital outlay was budgeted
Project Summary ex. [FY 2009 Early Childhood Block Grant – Joseph City Unified District](#)

| Capital Outlay | | |
|----------------|--------------|----------|
| Property | 6700 et. al. | 1,637.00 |

Click on **View Project Detail button** from Project Summary to see [Project Summary Detail](#) (include line item description, Capital outlay, and all of supplemental data)

- Project Summary Capital Outlay items are items you can purchase

| CAPITAL OUTLAY | | | | |
|--------------------|---------------|--------------|---------------------|-----------------|
| Quantity | Cost Per Unit | Description | Purpose | Total |
| 6 | 100.00 | tables | classroom furniture | 600.00 |
| 20 | 40.00 | chairs | classroom furniture | 800.00 |
| 1 | 237.00 | storage unit | classroom furniture | 237.00 |
| Grand Total | | | | 1,637.00 |

- If you would like to modify Capital Outlay (by Quantity, cost per unit, delete, add, etc.) you would need to submit an amendment.

Prior to 02/23/2009, LEA can edit the approved capital outlay item directly by adding / deleting. As shown below

| CAPITAL OUTLAY | | | | |
|-----------------|-------------------|-------------------------------|--------------------------------|-------------------------------------|
| Quantity | Cost Per Unit | Description | Purpose | Total |
| 106 | 100.00 | tables | classroom furniture | 1000 -600.00 |
| 1020 | 40.00 | chairs | classroom furniture | 800.00 400.00 |
| + | 237.00 | storage unit | classroom furniture | 237.00 |
| 1 | 200 | CD/ Cassette Listening Center | Classroom Resource | 200 |
| Grand Total | | | | 1600.00 1,637.00 |

After 02/23/2009, LEA cannot edit the approved capital outlay items (Project Summary Capital outlay items). With the new amendment process, an LEA can add, delete, or modify approved items by changing the text in the white cells.

- Grey cells indicate your approved original capital outlay item from Project Summary (cannot edit – read only)
- LEA can use white cells to modify current approved capital outlay items. When LEA creates an amendment after 02/23/2009, Amendment capital outlay page should show grey cells of original data and white cells of original data that can be edited. *CPU (Cost Per Unit)
- System calculate Total and New Total. New Total will reflect any changes from the white cells.

| CAPITAL OUTLAY | | | | | | | | |
|----------------|---------|-----|---------|--------------|---------------------|---------------------|--------|-----------|
| Qty | New Qty | CPU | New CPU | Description | Purpose | New Purpose | Total | New Total |
| 6 | 6 | 100 | 100 | tables | classroom furniture | classroom furniture | 600.00 | 600 |
| 20 | 20 | 40 | 40 | chairs | Classroom furniture | Classroom furniture | 800 | 800 |
| 1 | 1 | 237 | 237 | Storage unit | Classroom furniture | Classroom furniture | 237 | 237 |

Making Change using New Capital Outlay Page through Amendment **Current Amendment Capital Outlay**

| CAPITAL OUTLAY | | | | |
|-----------------|-------------------|-------------------------------|--------------------------------|-------------------------------------|
| Quantity | Cost Per Unit | Description | Purpose | Total |
| 106 | 100.00 | tables | classroom furniture | 1000 -600.00 |
| 1020 | 40.00 | chairs | classroom furniture | 800.00 400.00 |
| 1 | 237.00 | storage unit | classroom furniture | 237.00 |
| 1 | 200 | CD/ Cassette Listening Center | Classroom Resource | 200 |
| Grand Total | | | | 1600.00 1,637.00 |

New Capital Outlay Amendment Page after 02/23/09

| CAPITAL OUTLAY | | | | | | | | |
|----------------|---------|-----|---------|------------------------------|---------------------|---------------------|--------|-----------|
| Qty | New Qty | CPU | New CPU | Description | Purpose | New Purpose | Total | New Total |
| 6 | 10 | 100 | 100 | tables | classroom furniture | classroom furniture | 600.00 | 1000 |
| 20 | 10 | 40 | 40 | chairs | Classroom furniture | Classroom furniture | 800 | 400 |
| 1 | 0 | 237 | 237 | Storage unit | Classroom furniture | Classroom furniture | 237 | 0 |
| | 1 | | 200 | CD/Cassette Listening Center | | Classroom Resource | 0 | 200 |

- Make a change in existing capital outlay item: Modify the original data in New Qty, New CPU, New Purpose**
- Delete existing capital outlay item: set New Qty to 0 or New CPU(cost per unit) to 0**
- Adding new capital outlay item: add the new item in New Qty, New CPU, and New Purpose.**

3. Programmatic Amendment

B. Extend Project End Date (Only For Federal Grant)

LEA may extend project end date beyond the original approved data (most of project ends 06/30) for Federal grants

- **Amendment Contact information** allows LEA to extend their project end date.
- Change End data and provide amendment reason as Extend project end date

| LEA CONTACT INFORMATION | | |
|--|---|---------------------------------|
| Designation | Mr <input type="text"/> | |
| Project Director / Contact | ADE Trainer | |
| Phone Number | (<input type="text"/> 602) <input type="text"/> 542-1234 Ext <input type="text"/> | |
| Fax Number | (<input type="text"/> 602) <input type="text"/> 542-4567 | |
| E-mail Address | ADE.Trainer@azed.gov | |
| PROJECT INFORMATION | | |
| Grant Name | Start Date | End Date |
| LEA Amendment | <input type="text"/> 07/01/2008 | <input type="text"/> 06/30/2009 |
| AMENDMENT REASON | | |
| <div>Extend project end date from 06/30/09 to XX/XX/XXXX</div> | | |

3. Programmatic Amendment

* C. Budget line Description / Supplemental Data Changes

LEA may modify Budget Line Item Description / Supplemental Data as needed:

Examples

- Change staff duties or responsibilities
- Change the type of contractual services from the approved budget

Prior to 02/23/2009, LEA can edit the approved Budget line description directly by adding new data/ deleting the original data as shown below

| LINE ITEMS DESCRIPTION | | | |
|------------------------|-------------|----------|--|
| Function Code | Object Code | Amount | Description |
| Instruction 1000 | | | |
| Salaries (A) | 6100 | 10,000 | Salary for 0.2 FTE Special ED teacher |
| Supplies (B) | 6600 | 1,000.00 | (\$1,000) Classroom supplies for differentiation in the regular education classroom including manipulatives, computer software, leveled reading, writing, math materials Amendment No1: Mainly focus on after school enrichment program – materials/ supplies including manipulative and computer software |
| Other Expenses(C) | 6800 | 500.00 | Amendment No1: User enters data |

After 02/23/2009, LEA cannot edit the approved original line item description (Project Summary Line item description) through Amendment but can add or modify approved line item description if needed by using Adjusted Description.

- A. No change needs to be made to the original description – Save empty adjusted description
- B. If a user would like to make a change to the original description, enter them under adjusted description cell (White Cells).
- C. Added new line item on the line item page without original description (ex Other Expenses doesn't have Original Description since it was not a part of original application) – Line item description page requires Adjusted Description

| LINE ITEMS DESCRIPTION | | | | |
|------------------------|-------------|----------|---|--|
| Function Code | Object Code | Amount | Description | Adjusted Description |
| Instruction 1000 | | | | |
| Salaries (A) | 6100 | 10,000 | Salary for 0.2 FTE Special ED teacher | |
| Supplies (B) | 6600 | 1,000.00 | (\$1,000) Classroom supplies for differentiation in the regular education classroom including manipulative, computer software, leveled reading, writing, math materials | Mainly focus on after school enrichment program – materials/ supplies including manipulative and computer software |
| Other Expenses(C) | 6800 | 500.00 | | <i>Requires User input</i> |

4. Approved Completion Report

In order to carryover prior year's monies, LEA must review their approved completion report.

1. Log onto <https://training.ade.az.gov/gme/>
2. Click Completion Report
3. Click here to go to the ADE common Logon



GME Security Gateway

Grants Management users must now use the Common Logon to access the secure grants processes. If you already have a Common Logon account, please use your existing userID from now on to access the Grants Management Enterprise system.

[Click here to go to the ADE Common Logon](#)

4. Common Logon: Enter Common Logon UserID and Password.

UserID: trainer1

Password: adetrain

5. Click  [Grants Management](#)

The system will take you to secure grants management website under ADE as entity
<https://training.ade.az.gov/GME/default.asp?UserID=XXXX&EntityID=XXXXX>

6. Click on "Completion Report"

COMPLETION REPORTS IN PROGRESS

Instructions

- Select the project by clicking the project number.

00-00-00-000 : Arizona Department of Education

Fiscal Year

[Show Projects](#)

[Go Back](#)

| Fiscal Year | Grant | Project Number | CR Status | CR Holds | Last Update User | Last Update Date |
|-------------|---------------|-------------------------------------|-----------------|----------|------------------|---------------------|
| 2008 | LEA Amendment | 08FESGOA-899999-01A | Approved by ADE | | slors | 02/02/2009 15:44:28 |

| |
|-------------------------------------|
| Project Number |
| 08FESGOA-899999-01A |

3. Click on Project Number

4. **Completion Report Option Page:** click [View Approved Completion Report](#)

COMPLETION REPORT OPTION PAGE

Instructions

- Please verify the Project information below is correct. If the information is NOT correct, click 'Go Back' and select the correct Project.
- If the completion report information IS correct, click the desired option to continue.

| | | | |
|----------------|---------------------------------|------------|-------|
| District | Arizona Department of Education | | |
| CTDS | 000000000 | Entity ID | 79275 |
| Project Number | 08FESGOA-899999-01A | Project ID | 81899 |
| Grant Name | 2008 - LEA Amendment | | |

[View Approved Completion Report](#)

The ADE Program Office has approved the original completion report. You may use this to print a copy for your records, or to preview before choosing to revise an already-approved report.

[Revise Approved Completion Report](#)

The ADE Program Office has approved the original completion report. This option is provided to make changes, such as refunds that belong to the project, or funds discovered through audit. The report will go through the same process as it did when the report was originally submitted.

*Revised Approved Completion Report can be used to revise any approved completion report

5. Understanding Approved Completion Report.

APPROVED COMPLETION REPORT VIEW

Instructions

- To go back to the list of completion reports click 'Go Back

| | | | |
|-----------------------|---------------------------------|-------------------|-------|
| District | Arizona Department of Education | | |
| CTDS | 000000000 | Entity ID | 79275 |
| Project Number | 08FESGOA-899999-01A | Project ID | 81899 |
| Grant Name | 2008 – LEA Amendment | | |

| FUNDS SUMMARY | |
|---|------------|
| Total Budgeted Funds | 110,000.00 |
| Current Fiscal Year ADE Disbursement | 0.00 |
| Carryover Funds | 0.00 |
| Balance unpaid at project end date | 110,000.00 |
| Balance unpaid as of 2/4/2009 | 110,000.00 |
| Allowable Cash on Hand | 0.00 |
| Cash On Hand (less interest earned) | -10,000.00 |
| Interest Earned | 300.00 |
| Other | 10,000.00 |
| Comments(s) / Explanation of 'Other' Funds (Funds must be clearly identified with a project year.) | |
| FY 2006 unamended fund carryover \$5000 and excess interest \$5000 | |

| | | | | | |
|---------------|-------------|------------------|--------------------|-------------------|--------------------|
| Total | | 110,000.00 | 10,000.00 | 100,000.00 | 0.00 |
| Function Code | Object Code | Budget Amount | Expended Amount | Budget Balance | Ov./Un. Expend. |

Summary Analysis

Total Amendment Amount:
 $= 200 + 50,000 + 5000 = 55,200$

Total Return Amount:
 $= 100 + 5000 = 5100$

| SUMMARY ANALYSIS | | |
|------------------|-------------|-----------------|
| Category | Fund Amount | Interest Amount |
| Fiscal year 2006 | | |
| Return | 0.00 | 0.00 |
| Amend – Local | 0.00 | 0.00 |
| Amend – State | 0.00 | 0.00 |
| Fiscal year 2007 | | |
| Return | 0.00 | 0.00 |
| Amend – Local | 0.00 | 0.00 |
| Amend – State | 0.00 | 0.00 |
| Fiscal year 2008 | | |
| Return | 0.00 | 100.00 |
| Amend – Local | 0.00 | 200.00 |
| Amend – State | 50,000.00 | 0.00 |

Other Funds

| OTHER FUNDS | | |
|---------------------------|------------------|---|
| Type | Amount | Description |
| Other Amend Non Interest | 5,000.00 | FY 2006 unamended fund carryover \$5000 |
| Other Amend Interest | 0.00 | |
| Other Return Non Interest | 5,000.00 | FY 2006 excess interest not returned \$5000 |
| Other Return Interest | 0.00 | |
| Keep | 0.00 | |
| Not to be Paid | 0.00 | |
| Total | 10,000.00 | |

*Approved completion report – summary analysis is required table. Other Funds will only display if LEA reports other funds under Fund Summary.

- A. LEA should submit an amendment to amend carryover amount into current year project
- B. LEA should return total amount to ADE accounting.

5. Submit Amendment

1. Go to <https://training.ade.az.gov/gme/>
2. Click on [Amendments](#)
3. Click on [Click here to go to the ADE Common Logon](#)
4. Enter Common Logon user name and password (trainer1, adetrain) and click Continue
5. Under Common Logon Application Menu, click Grants Management
6. Click on [Amendments](#)

AMENDMENTS IN PROGRESS

Instructions

- To create new amendment click Create New button.
- Select the amendment by clicking the project number.

00-00-00-000 : Arizona Department of Education

No amendments in progress ...

Create New AmendmentGo Back

7. Click “Create New Amendment”
8. Find the project number assign to you (Project number should end with your student number) and click on [Create Amendment](#)

PROJECT SELECTION

Instructions

- To create new amendment, select the project by clicking 'Create Amendment'.
- To go back to the previous screen click 'Go Back'.

00-00-00-000 : Arizona Department of Education

| Fiscal Year | Grant Name | Project Number | |
|-------------|---------------|----------------------------|----------------------------------|
| 2009 | LEA Amendment | 09FESGOA-999999-Instructor | Create Amendment |
| 2009 | LEA Amendment | 09FESGOA-999999-Student01 | Create Amendment |
| 2009 | LEA Amendment | 09FESGOA-999999-Student02 | Create Amendment |
| 2009 | LEA Amendment | 09FESGOA-999999-Student03 | Create Amendment |

9. Amendment Option Page – Click [Create New Amendment](#) (if you are working on existing amendment, your options will be continue amendment, cancel amendment)
10. Program Assurances – click I agree

Now, you can edit each page and submit an amendment. Before starting the amendment, we will jot down all of the changes we would like to make for this amendment.

| | |
|--|---|
| <p>FINANCIAL DATA</p> <ul style="list-style-type: none"> <input type="checkbox"/> Contact Information <input checked="" type="checkbox"/> Line Items <input checked="" type="checkbox"/> Line Items Description <input checked="" type="checkbox"/> Capital Outlay <p>SUPPLEMENTAL DATA</p> <ul style="list-style-type: none"> IDEA Basic Online Application Instructions <input type="checkbox"/> IDEA Basic Entitlement Narratives <p>SUMMARY & SUBMIT</p> <p>EXIT AMENDMENT</p> | <p>Click on a word link to the left to fill out/correct that page. When you are finished filling out/correcting a page, click the Save button at the bottom of each page.</p> <p>When you are finished filling out/correcting all required pages, click on the Summary link to see a comprehensive review of all the data you entered. If you receive a grid with messages <u>before</u> the comprehensive review page appears, correct any indicated errors, and then click on Summary again.</p> <p>On the comprehensive review page if you find you need to make a change, click on the corresponding link on the left to modify a page. When you are satisfied with all entries, click the Submit button (if available*) to send the data electronically.</p> <p>If you wish to return to the process later without submitting, click the Exit link to go back to the selection page.</p> <p>You are allowed no more than 60 minutes per page, therefore, save data frequently. If you time out, re-enter the process from the selection page.</p> |
|--|---|

11. Write down all of changes you would like to make for this amendment

a. Extend project end date from 6/30/2009 to 09/30/2009

b. Amend FY 2008 carryover : Total carryover amount - \$ **55,200**

| Function Code | Object Code | Amount / Description |
|------------------|---------------|--|
| Instruction 1000 | Salaries 6100 | \$30,000 / add 0.75 FTE special education teacher |
| Instruction 1000 | Benefits 6200 | \$3,000 / benefit for added 0.75 FTE special education teacher |
| Instruction 1000 | Supplies 6600 | \$12,200 / additional instruction supplies |
| Capital Outlay | 6700 et al | \$10000 / Printers and digital cameras |

(We are increasing the budget total by \$55,200. Line item change total should be \$55,200. If you are not increasing the budget total, your line item change total should be \$0)

c. Increase and decrease line item amount due to program change

| Function Code | Object Code | Amount / Description |
|----------------------|-------------------------------------|--|
| Support Service 1000 | Salaries 6100 | -16,000 / Changed to Salary for 0.25 FTE special education support staff. |
| Support Service | Purchased Professional Service 6300 | \$16,000 / Attending IDEA annual conferences - admin, teachers, support staff. |

12. Edit Contact Information – enter Amendment Reason and change project end date.

| LEA CONTACT INFORMATION | | |
|--|---|---------------------------------|
| Designation | Mr <input type="text"/> | |
| Project Director / Contact | ADE Trainer | |
| Phone Number | (<input type="text"/> 602) <input type="text"/> 542-1234 Ext <input type="text"/> | |
| Fax Number | (<input type="text"/> 602) <input type="text"/> 542-4567 | |
| E-mail Address | ADE.Trainer@azed.gov | |
| PROJECT INFORMATION | | |
| Grant Name | Start Date | End Date |
| LEA Amendment | <input type="text"/> 07/01/2008 | <input type="text"/> 09/30/2009 |
| AMENDMENT REASON | | |
| <div> <div>1. extend project end data to 09/30/2009</div> <div>2. amend FY 2008 carryover \$55,200</div> <div>3. increase and decrease line item amount due to program change</div> </div> | | |

13. Line item page - modify the page using b. carryover table and click save.b. Amend FY 2008 carryover : Total carryover amount - \$ **55,200**

| Function Code | Object Code | Amount / Description |
|------------------|---------------|--|
| Instruction 1000 | Salaries 6100 | \$30,000 / add 0.75 FTE special education teacher |
| Instruction 1000 | Benefits 6200 | \$3,000 / benefit for added 0.75 FTE special education teacher |
| Instruction 1000 | Supplies 6600 | \$12,200 / additional instruction supplies |
| Capital Outlay | 6700 et al | \$10000 / Printers and digital cameras |

(We are increasing the budget total by \$55,200. Line item change total should be \$55,200. If you are not increasing the budget total, your line item change total should be \$0)

| BUDGET LINE ITEMS | | | | |
|--------------------------------------|-------------|----------------|-----------|----------------|
| Function Code | Object Code | Current Budget | * Change | Amended Budget |
| Instruction 1000 | | | | |
| Salaries | 6100 | 95,000.00 | 30,000.00 | 125,000.00 |
| Employee Benefits | 6200 | 35,000.00 | 3,000.00 | 38,000.00 |
| Purchased Professional Services | 6300 | 0.00 | 0.00 | 0.00 |
| Purchased Property Services | 6400 | 0.00 | 0.00 | 0.00 |
| Other Purchased Services | 6500 | 0.00 | 0.00 | 0.00 |
| Supplies | 6600 | 2,000.00 | 12,200.00 | 14,200.00 |
| Other Expenses | 6800 | 0.00 | 0.00 | 0.00 |
| Subtotal for Instruction 1000 | | 132,000.00 | 45,200.00 | 177,200.00 |

| | | | | |
|-----------------------|-------------|------------|-----------|------------|
| Capital Outlay | | | | |
| Property | 6700 et al. | 5,000.00 | 10,000.00 | 15,000.00 |
| Total | | 183,700.00 | 55,200.00 | 238,900.00 |

To increase line item, just enter positive number.

(We are increasing the budget total by \$55,200. Line item change total should be \$55,200)

14. Line item Description page – Add Adjusted Description using amendment reason b. carryover table.

b. Amend FY 2008 carryover : Total carryover amount - \$ 55,200

| Function Code | Object Code | Amount / Description |
|------------------|---------------|--|
| Instruction 1000 | Salaries 6100 | \$30,000 / add 0.75 FTE special education teacher |
| Instruction 1000 | Benefits 6200 | \$3,000 / benefit for added 0.75 FTE special education teacher |
| Instruction 1000 | Supplies 6600 | \$12,200 / additional instruction supplies |
| Capital Outlay | 6700 et al | \$10000 / Printers and digital cameras |

| LINE ITEMS DESCRIPTION | | | | |
|-------------------------|--------------|------------|--|--|
| Function Code | Object Code | Amount | Description | Adjusted Description |
| Instruction 1000 | | | | |
| Salaries | 6100 | 125,000.00 | Salary for 2 FTE special education teachers and 6 special education paraprofessionals | add 0.75 FTE special education teacher |
| Employee Benefits | 6200 | 38,000.00 | Benefits (including withholding tax, retirement, social security and medical) for 2 FTE special education teachers and 6 special education paraprofessionals | benefit for added 0.75 FTE special education teacher |
| Supplies | 6600 | 14,200.00 | Instructional supplies | additional instruction supplies |
| Capital Outlay | | | | |
| Property | 6700 et. al. | 15,000.00 | Laptops for special education instructional staff | add Printers and digital cameras |

15. Update capital outlay page to include additional \$10,000 (amendment reason b)

- i. Reduce the quantity of Laptops from 5 to 3.
- ii. Add 5 printers (unit cost \$1000) for Sped teachers
- iii. Add 5 Digital cameras (unit cost \$1000) for Sped students
- iv. Add 4 CD players (unit cost \$500) for Sped classroom instruction (listening center)

| Amount allocated in Budget for Capital Outlay |
|---|
| 15,000.00 |

| CAPITAL OUTLAY | | | | | | | | |
|--------------------|---------|----------|----------|-----------------|--------------------------|---|----------|-----------|
| Qty | New Qty | CPU | New CPU | Description | Purpose | New Purpose | Total | New Total |
| 5 | 3 | 1,000.00 | 1,000.00 | Laptops | For use by SPED Teachers | For use by SPED Teachers | 5,000.00 | 3,000.00 |
| | 5 | | 1,000.00 | Printers | | For SPED Teachers | 0.00 | 5,000.00 |
| | 5 | | 1,000.00 | Digital Cameras | | For Sped students | 0.00 | 5,000.00 |
| | 4 | | 500.00 | CD players | | For Sped classroom instruction (listening center) | 0.00 | 2,000.00 |
| | | | | | | | 0.00 | 0.00 |
| | | | | | | | 0.00 | 0.00 |
| Grand Total | | | | | | | 5,000.00 | 15,000.00 |

16. This time we will increase / decrease line item indicated table below. (5 min)

Modify the line item page and line item description page accordingly.

c. Increase and decrease line item amount due to program change

| Function Code | Object Code | Amount / Description |
|----------------------|-------------------------------------|--|
| Support Service 2100 | Salaries 6100 | -16,000 / Changed to Salary for 0.25 FTE special education support staff. |
| Support Service 2100 | Purchased Professional Service 6300 | \$16,000 / Attending IDEA annual conferences - admin, teachers, support staff. |

**See page 28 for screen shot*

16. Answer**b. Increase and decrease line item amount due to program change**

| Function Code | Object Code | Amount / Description |
|----------------------|-------------------------------------|--|
| Support Service 2100 | Salaries 6100 | -16,000 / Changed to Salary for 0.25 FTE special education support staff. |
| Support Service 2100 | Purchased Professional Service 6300 | \$16,000 / Attending IDEA annual conferences - admin, teachers, support staff. |

Answer: Line item page

FINANCIAL DATA

Contact Information

Line Items

Line Items Description

Capital Outlay

SUPPLEMENTAL DATA

IDEA Basic Online

Application Instructions

IDEA Basic

Entitlement Narratives

SUMMARY & SUBMIT

EXIT AMENDMENT

Support Services 2100, 2200, 2600, 2700

| | | | | |
|--|------|-----------|------------|-----------|
| Salaries | 6100 | 26,000.00 | -16,000.00 | 10,000.00 |
| Employee Benefits | 6200 | 8,000.00 | 0.00 | 8,000.00 |
| Purchased Professional Services | 6300 | 1,000.00 | 16,000.00 | 17,000.00 |
| Purchased Property Services | 6400 | 0.00 | 0.00 | 0.00 |
| Other Purchased Services | 6500 | 1,500.00 | 0.00 | 1,500.00 |
| Supplies | 6600 | 200.00 | 0.00 | 200.00 |
| Other Expenses | 6800 | 0.00 | 0.00 | 0.00 |
| Subtotal for Support Services 2100, 2200, 2600, 2700 | | 36,700.00 | 0.00 | 36,700.00 |

Answer: Line item description page

| Support Services 2100, 2200, 2600, 2700 | | | | | | | | | |
|---|------|-----------|--|--|--|--|--|--|--|
| Salaries | 6100 | 10,000.00 | Salary for 1 FTE special education support staff. This employee provides support in areas of data collection, record keeping, scheduling IEP/MET meetings, and | | -16,000/Changed to Salary for 0.25 FTE sepcial education support staff. | | | | |
| Employee Benefits | 6200 | 8,000.00 | Benefits (including withholding tax, retirement, social security and medical) for 1 FTE special education support staff | | | | | | |
| Purchased Professional Services | 6300 | 17,000.00 | Training and development for teachers to include Directors Conference, Transition Conference, autism, and inclusion. | | \$16,000 / Attending IDEA annual conferences - admin, teachers, support staff. | | | | |
| Other Purchased Services | 6500 | 1,500.00 | Travel expenses related to training and development of special education teachers. | | | | | | |
| Supplies | 6600 | 200.00 | Supplies for special education staff | | | | | | |

17. Click on Summary and Submit to review your amendment pages

(Any change you made on the line item, line item description, capital outlay will show in red)

| | | | |
|-------------------------|---------------------------------|-------------------|-------|
| District | Arizona Department of Education | | |
| CTDS | 000000000 | Entity ID | 79275 |
| Project Number | 09FESGOA-999999-Instructor | Project ID | 81897 |
| Grant Name | 2009 - LEA Amendment | | |
| Amendment Number | 1 | | |

Contact Information

| LEA CONTACT INFORMATION | |
|--|----------------------|
| Designation | Mr |
| Project Director / Contact | ADE Trainer |
| Phone Number | (602) 542-1234 |
| Fax Number | (602) 542-4567 |
| E-mail Address | ADE.Trainer@azed.gov |
| PROJECT INFORMATION | |
| Start Date | End Date |
| 07/01/2008 | 09/30/2009 |
| AMENDMENT REASON | |
| 1. Extend project end data to 09/30/2009 2. Amend FY 2008 carryover \$55,200 3. increase and decrease line item amount due to program change | |

Line Items

| BUDGET LINE ITEMS | | | | |
|--|-----------------|----------------|----------------|----------------|
| Function Code | Object Code | Current Budget | Change | Amended Budget |
| Instruction 1000 | | | | |
| Salaries | 6100 | 95,000.00 | 30,000.00 | 125,000.00 |
| Employee Benefits | 6200 | 35,000.00 | 3,000.00 | 38,000.00 |
| Purchased Professional Services | 6300 | 0.00 | 0.00 | 0.00 |
| Purchased Property Services | 6400 | 0.00 | 0.00 | 0.00 |
| Other Purchased Services | 6500 | 0.00 | 0.00 | 0.00 |
| Supplies | 6600 | 2,000.00 | 12,200.00 | 14,200.00 |
| Other Expenses | 6800 | 0.00 | 0.00 | 0.00 |
| Subtotal for Instruction 1000 | | 132,000.00 | 45,200.00 | 177,200.00 |
| Support Services 2100, 2200, 2600, 2700 | | | | |
| Salaries | 6100 | 26,000.00 | - 16,000.00 | 10,000.00 |
| Employee Benefits | 6200 | 8,000.00 | 0.00 | 8,000.00 |
| Purchased Professional Services | 6300 | 1,000.00 | 16,000.00 | 17,000.00 |
| Purchased Property Services | 6400 | 0.00 | 0.00 | 0.00 |
| Other Purchased Services | 6500 | 1,500.00 | 0.00 | 1,500.00 |
| Supplies | 6600 | 200.00 | 0.00 | 200.00 |
| Other Expenses | 6800 | 0.00 | 0.00 | 0.00 |
| Subtotal for Support Services 2100, 2200, 2600, 2700 | | 36,700.00 | 0.00 | 36,700.00 |
| Capital Outlay | | | | |
| Property | 6700 et. al. | 5,000.00 | 10,000.00 | 15,000.00 |
| Total | | 183,700.00 | 55,200.00 | 238,900.00 |

Line Items Description

| LINE ITEMS DESCRIPTION | | | |
|--|-----------------|------------|--|
| Function Code | Object Code | Amount | Description |
| Instruction 1000 | | | |
| Salaries | 6100 | 125,000.00 | Salary for 2 FTE special education teachers and 6 special education paraprofessionals add 0.75 FTE special education teacher |
| Employee Benefits | 6200 | 38,000.00 | Benefits (including withholding tax, retirement, social security and medical) for 2 FTE special education teachers and 6 special education paraprofessionals benefit for added 0.75 FTE special education teacher |
| Supplies | 6600 | 14,200.00 | Instructional supplies additional instruction supplies |
| Support Services 2100, 2200, 2600, 2700 | | | |
| Salaries | 6100 | 10,000.00 | Salary for 1 FTE special education support staff. This employee provides support in areas of data collection, record keeping, scheduling IEP/MET meetings, and monitorings. -16,000/Changed to Salary for 0.25 FTE special education support staff. |
| Employee Benefits | 6200 | 8,000.00 | Benefits (including withholding tax, retirement, social security and medical) for 1 FTE special education support staff |
| Purchased Professional Services | 6300 | 17,000.00 | Training and development for teachers to include Directors Conference, Transition Conference, autism, and inclusion. \$16,000/Attending IDEA annual conferences – admin, teachers, support staff. |
| Capital Outlay | | | |
| Property | 6700 et. al. | 15,000.00 | Laptops for special education instructional staff add Printers and digital cameras |

Capital Outlay

| Qty | New Qty | CPU | New CPU | Description | Purpose | New Purpose | Total | New Total |
|--------------------|---------|----------|----------|-----------------|--------------------------|---|----------|-----------|
| 5 | 3 | 1,000.00 | 1,000.00 | Laptops | For use by SPED Teachers | For use by SPED Teachers | 5,000.00 | 3,000.00 |
| | 5 | | 1,000.00 | Printers | | For SPED Teachers | 0.00 | 5,000.00 |
| | 5 | | 1,000.00 | Digital Cameras | | For SPED students | 0.00 | 5,000.00 |
| | 4 | | 500.00 | CD players | | For SPED classroom instruction (listening center) | 0.00 | 2,000.00 |
| Grand Total | | | | | | | 5,000.00 | 15,000.00 |

[Submit Amendment](#)

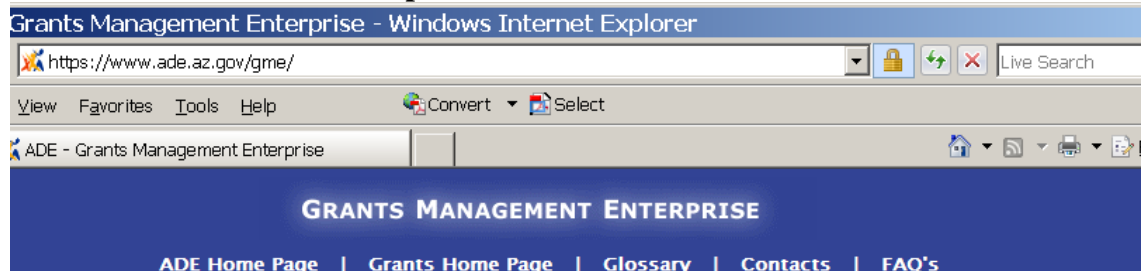
(If you are a GSA signer, you will have Submit Amendment Button to submit this amendment to ADE)

6. Contact Information

*** If you have any grant specific questions, please contact specific program area.**

1. Go to <https://www.ade.az.gov/gme/> Grants Home page

2. Click Contacts from the top blue menu bar.



3. Program Contact List includes Program area contact information and grant hyperlinks.

| Grants Program Contact List | | | |
|--------------------------------------|--|--|--|
| Program | Main Contact | Alternate Contact | Responsibilities |
| Academic Achievement | Lois Kruse Central Processing Unit Manager (602) 542-7473 Lois.Kruse@azed.gov | Brenda Davis Program Project Specialist II (602) 364-1909 Brenda.Davis@azed.gov | Program Responsibilities: Comprehensive School Reform Demonstration (Obey-Porter); Johnson O'Malley/Indian Ed. ; Refugee Child School Impact Grant; Title I/IIA (Neglected & Delinquent, LEA, Migrant Ed. Basic Grant, Homeless Children-Stewart B. McKinney), LEA-Neglected, School Improvement; Title II (Improving Teacher Quality (formerly known as Eisenhower Prof. Dev.) and Title V-A Innovative Programs (formerly known as Title VI Innovation Ed. Prg. Strg.); Discontinued: Class Size Reduction; GOALS 2000; Cap. Exp./Private Schools; Title II Journey Schools |

Grants Management Office Contact

| Name | Phone | Email |
|---------------|--------------|--|
| Sarah Lors | 602-542-4339 | Sarah.Lors@azed.gov |
| Mary Dallman | 602-542-3470 | Mary.Dallman@azed.gov |
| Enrique Duron | 602-542-3695 | Enrique.Duron@azed.gov |
| Clara Bazso | 602-542-3452 | Clara.Bazso@azed.gov |

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